

PUBLIC EMPLOYEES' RETIREMENT SYSTEM PERS-HRD-88 (Rev. 7/89) (PC)		Title of Position Retirement Program Specialist II (Technical)	Unit # 1
POSITION DUTY STATEMENT		Division and/or Subdivision CSSED - Sacramento Regional Office	
INSTRUCTIONS: The Executive Officer is required by Government Code Section 18805 to report (or to record) "... material changes in the duties of any position in his jurisdiction." The Position Duty Statement is used for this purpose. Enter identifying information and effective date at the right. Enter brief description of each of the important duties and responsibilities of the position below. Group related duties in numbered paragraphs and indicate the proportion of total work time occupied. Prepare copies for employee assigned to the position and his/her supervisor.		Location of Headquarters 400 Q Street, Sacramento, CA 95811	
		Class Title of Position Retirement Program Specialist II (Technical)	
		Position Number 275-921-5188-XXX, POS #2204, REC # 6445	
		Effective Date April 26, 2007	
Percent of Time Required	Effective on the date indicated, the employee assigned to the position identified above performs the following duties and responsibilities:		
50%	Under the general direction of the Regional Office Manager and working with Division Management to support the goals and objectives of the CalPERS Customer Service and Education Division , the Retirement Program Specialist II (Technical) performs the following duties: Provides financial planning education and assistance on a group basis to members, retirees, and beneficiaries on all retirement, health benefit and other programs administered by CalPERS including Deferred Compensation, Long Term Care and the Home Loan Program in the office and at field sites. Responsible for the coordination, scheduling, planning, conducting and the continued development of financial planning topics covered in the Financial Planning Seminars which includes Social Security and the State Savings Plus Program. Conducts presentations of a complex nature for employee, employer and retiree groups. Conducts presentations for employer governing bodies and employee associations related to contracting for CalPERS retirement coverage and benefit contract improvements, participating in the Public Employees' Medical and Hospital Care Act (PEMHCA) program and explaining complex retirement and health benefit law changes in the office and at field location sites. Enters estimate request information on the automated calculation system. Reviews estimate output for accuracy. Approximately 35% to 50% of the time is spent at field locations conducting Retirement Planning Workshops, Financial Planning Seminars, Custom Presentations, attending off site training classes, special project team meetings and providing office coverage for other offices when short staffed. There will be instances when overnight travel may be required as well as after normal working hours and weekends. Provides counseling regarding retirement and health benefits to members in imminent death situations and to members with more complex and sensitive issues. May require coordination with other divisions or other retirement systems. Provides One on One retirement counseling sessions.		
35%	Develops customized presentations for specialized meetings. Responsible for updating presentation material, reviewing technical publications, developing alternative methods of information delivery by researching new and innovative approaches to presentations including audio, video, computerization, video conferencing and audience participatory techniques. Provides the highest quality customer service by using all available resources to provide the most current information in the best format available, always striving to enhance the public image of CalPERS.		
15%	Responds verbally and in writing to members, retirees, and other groups on the more sensitive and complex inquiries. Reviews and analyzes the impact of proposed and chaptered legislation. Attends Legislative Coordinator meetings as requested and summarizes the current status of new and pending legislation. Participates on system and division-wide teams, which require in-depth review of current practices, available alternatives and the preparation of written reports. Provide training on implementation of new procedures or changes in procedure. Serves as the division liaison with CalPERS or with other agencies and acts as project coordinator as required by management. Assist in the development of the 6 month workshop and seminar schedule. On a timely basis complete a work schedule for volume and time count for preparation of monthly management reports (Statistical Data Reports). Office coverage is required from 8:00AM to 5:00PM.		